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CALIFORNIA RAISIN MARKETING BOARD

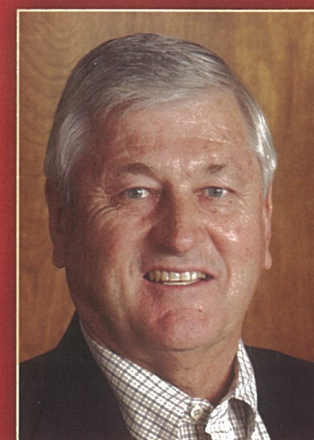
2009/2010 ANNUAL REPORT



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Statement from the Chairman



Greetings:

Fiscal year 2009/2010 was both a rewarding and a challenging year, as the California Raisin Marketing Board (CRMB) team continued to work well together to deliver a very solid overall marketing program. In looking back over the past five years, it is interesting to see the shift in emphasis in our marketing plans and programs. In my statement last year, I noted that we had launched "The Wise Choice Campaign" in 2007 and consumers are more than ever aware of the health and nutrition benefits of California Raisins.

Our Scientific Nutrition Research Panel, headed by Dr. James Painter of Eastern Illinois University has four active research projects underway. These include a comparison of raisins versus sports gels, a study to measure if raisins eaten as a pre-meal snack will help to curb overall calorie intake, a complete analysis of the phyto-nutrients in raisins to determine if raisins uniquely contain any ingredients or chemicals that are especially beneficial to health, and a human trial that compares raisins to other commonly eaten sweet and salty snacks.

Additionally, Dr. Stacey Bell has successfully written and will have published four manuscripts based on research previously funded by the CRMB. These papers show California Raisins being high in anti-oxidants, positive in promoting gut health, positive in helping to promote dental health and lastly, that California Raisins have a moderate Glycemic index that may benefit diabetics. All of the ongoing research will help to make California Raisins an even more desirable product for health-conscious consumers.

On the challenging side, the 2009/2010 crop came in more than 20,000 tons below forecast, and this caused a shortfall in assessment income and CRMB staff was able to cut back spending to offset the revenue shortfall to keep nearly all the programs in place. Our participation in trade events designed to encourage more raisin usage is receiving praise from those Board members able to attend. Five years ago, the majority of events promoted the dining out industry. Last year's trade events were balanced between bakery and snacks, in-store bakery and delis, new product development for food manufacturers, and events for school foodservice, registered dietitians, and college foodservice programs.

In summary, I believe we have a solid and balanced advertising, public relations, and trade event program that puts California Raisins in a very positive light to today's time-starved, but health-minded consumers. And again I want to say "THANK YOU" to those CRMB Board members and alternates who willingly give their time and expertise to help make the CRMB a valuable organization of growers.

Dennis With

The Marketing Order for California Raisins: a Look at the Last Five Years

"CALIFORNIA RAISINS ARE ONE OF THE MAJOR SPECIALTY CROPS PRODUCED IN THE STATE. THE PRODUCTION AND MARKETING OF RAISINS AFFECTS THE WELFARE, STANDARD OF LIVING AND HEALTH OF A LARGE NUMBER OF CITIZENS RESIDING IN THE STATE. IN ADDITION, A LARGE PORTION OF THIS CROP IS EXPORTED WHICH POSITIVELY AFFECTS THE CALIFORNIA ECONOMY AND THE U. S. BALANCE OF TRADE. THE INABILITY TO MAINTAIN OR EXPAND PRESENT MARKETS, OR TO DEVELOP NEW OR LARGER MARKETS RESULTS IN AN UNREASONABLE AND UNNECESSARY WASTE OF THE AGRICULTURAL WEALTH OF THIS STATE. IT IS THEREFORE IN THE PUBLIC INTEREST FOR THE PRODUCERS OF CALIFORNIA RAISINS TO ESTABLISH A CALIFORNIA RAISIN MARKETING BOARD TO CONDUCT MARKET DEVELOPMENT ACTIVITIES TO IMPROVE THE DEMAND FOR ALL CATEGORIES OF RAISIN USAGE, INCLUDING INGREDIENT USAGE AND FOR RETAIL PACKAGES, BOTH BRANDED AND PRIVATE LABEL."

**– PREAMBLE BY THE STATE OF CALIFORNIA-DEPARTMENT OF FOOD AND AGRICULTURE
FOR THE MARKETING ORDER FOR CALIFORNIA RAISINS**

As you can see, the California Raisin Marketing Board was created by the producers of raisins to improve their standard of living, health and welfare. You will see in this section some examples of how the board and staff have done so through marketing and advertising, new product development, contests, outreach and education, research and information dissemination.

The results of these research, education and marketing efforts are that from 2005 through 2010, over 1.7 million natural condition tons of raisins were produced by our raisin growers and over 1 million packed tons were marketed to domestic and Canadian buyers. This production generated over \$1.9 BILLION in farm-gate revenue to California growers!

California Raisin Marketing Board, led by Chairman Dennis Wilt, in session



2011 CRMB Referendum

By Gary Schulz, President, California Raisin Marketing Board

As directed by the marketing order, the California Raisin Marketing Board and the California Department of Food and Agriculture will conduct a referendum with ballots being mailed to all raisin growers on or about February 1, 2011. Voters have thirty days to return their ballots and a simple majority is required to continue the CRMB for another five years.

We believe if you review the efforts and results of the board and staff of the past five years that the CRMB has earned the privilege of working another five years for the benefit of the California raisin grower.

If you have any questions about our accomplishments, our goals and objectives, the referendum, or anything you read in this annual report or on our website, LoveYourRaisins.com, please feel free to contact me by calling (559) 248-0287 or by emailing me at gary@raisins.org.

Our board members and our staff work very hard on your behalf and we are committed to continuing the excellent tradition of marketing "California Raisins... The Wise Choice."

Health and Nutrition

Over the last five years, the CRMB has had the opportunity to work with well-respected nutrition professionals to develop and deliver nutrition messages about California Raisins. The board initially worked with Dr. Julie Jones, Professor Emeritus, St. Catherine University, as the national spokesperson and eventually added nutrition professionals from target markets such as Denver, Dallas, Miami and Los Angeles. These additional spokespersons were collectively known as the “Super RD’s,” who are registered dietitians recruited to serve as spokespersons on our industry’s behalf.

Another highlight in this channel was the creation of the Scientific Nutrition Research Panel. In 2008, the Board invited six highly qualified professionals in the field of Nutrition Science to join the new Research Panel. Initially, all six members accepted the invitation to join and the first Scientific Nutrition Research Panel of the California Raisin Marketing Board was formed.

The purpose of the Panel is to:

- Provide oversight and guidance for funded research projects
- Discuss and present new research ideas
- Assist with Request for Proposal (RFP) development
- Evaluate proposals - critique methodology, analyze budget and review project length
- Evaluate funded research results

Today the CRMB works with Dr. James Painter, Chair of Food and Consumer Sciences, Eastern Illinois University. Dr. Painter is the CRMB’s Nutrition Research Director and national spokesperson; and has “Super RD” regional spokespersons in Phoenix, Boston, Chicago, and San Francisco.

MEMBERS OF THE SCIENTIFIC NUTRITION RESEARCH PANEL

- Dr. James Painter, Ph.D, R.D., Chairman, Eastern Illinois University, Charleston, IL
- Dr. Rui Hai Liu, M.d., Ph.D., Cornell University, Ithaca, NY
- Dr. Rita Grandgenett, M.S., R.D., Battle Creek, MI
- Dr. James Anderson, M.D., University of Kentucky, Lexington, KY
- Dr. Stacey Bell, D.Sc., R.D., Boston, MA

Dr. James Painter addressing 250 dietitians in Boston, November 2010



THE RESEARCH PROJECTS BELOW ARE RESULTS OF THE WORK OF THE SCIENTIFIC NUTRITION RESEARCH PANEL:

CALIFORNIA RAISIN MARKETING BOARD HEALTH RESEARCH				
Category	Researcher	Project Title	Start Date	Anticipated Completion Date
Glycemic Control/ Sustainable Energy	Dr. Brian Davis	Effects of Carbohydrate Supplementation Type on Exercise Performance after Consecutive Day Exercise Bouts in Marathon Runners	6/1/2010	6/1/2011
Satiety	Dr. G. Harvey Anderson	The Effects of a Pre-Meal Raisin Snack on Satiety and Food Intake in Children	6/15/2010	6/15/2011
Antioxidant & Disease Prevention	Dr. Harold Bays	A Randomized, Unblinded, Single Research Site, Comparator Study of Raisins Versus Alternative Snacks on Cardiovascular Risk Factors In Generally Healthy Subjects.	12/15/2010	7/20/2011
Phytochemical Profiles	Dr. Rui Hai Liu	Phytochemical Profiles of Raisins: Isolation, Structure Elucidation, and Their Bioactivities	1/1/2011	12/31/2011

Crop Research

Crop Production Research is vital to sustaining the raisin industry and over the last five years the areas of research the CRMB has funded include: Cultural, Cultivars and Rootstocks and Pest/Disease Management.

The CRMB partners with UC Davis, American Vineyard Foundation, California Competitive Grants Program for Research in Viticulture and Enology, California Grape Rootstock Improvement Commission, California Grape Rootstock Research Foundation, California Table Grape Commission, Oregon Wine Board, Viticulture Consortium West, and Washington State Grape & Wine Research to provide a uniform process in which proposals are submitted and how research proposals are reviewed. All participants have found this process to be a very effective way of announcing annual funding. A full report may be requested for any project funded in the last five years by contacting our office at (559) 248-0287. See page 26 for a list of 2009/2010 crop research projects.

Grower Symposium

Since 2008, the CRMB has worked with the University of California Cooperative Extension to co-sponsor their San Joaquin Valley Grape Symposium. This biennial event, held in Easton at the Portuguese Hall, is dedicated to the raisin industry every two even years.

The sponsorship by the CRMB adds value to the overall event. With the addition of a customized raisin breakfast and lunch, growers are able to taste recipes that have been developed and used at various tradeshow and events. Presentations highlighting activities are given both by the CRMB leadership team and the advertising agency, Fleishman-Hillard. Door prizes are raffled off throughout the day, adding in some extra fun to this local event.



Best of Show One Slice at a Time



In 2007, CRMB attended the American Pie Council's (APC) National Pie Championship to stimulate raisin usage in the pie category (the U.S. pie sales are nearly \$600 million per year as estimated by Information Resources, Inc.). In 2008, CRMB sponsored a raisin flavor category in both the commercial and amateur pie baking categories at the APC's National Pie Championships and garnered 39 raisin pie entries, which was more than the apple category. The first place recipe was California Raisin and Sour Cream Dream Pie by Karen Hall of Nebraska.

In the 2009 Championships, the raisin flavor category continued to spark interest, the number of pie entries held steady and the winning raisin recipe came from California, California Raisin and Maple Crunch Pie by Patricia Lapiezo. However, in 2010, CRMB marketed to the professional pie bakers as well as the commercial and amateur pie bakers. And, it was a wise choice. The coveted **Blue Ribbon**, BEST of SHOW winning pie recipe was Chocolate Raisin Walnut Pie by Andrea Spring, of Florida - beating out cherry, apple, or any kind of cream or custard pie! So sit back and enjoy a slice of American heritage right from the California raisin industry with Chocolate Raisin Walnut Pie. And for non- chocolate lovers, try a slice of Best California Raisin Pie Under the Sun. It will warm your spirit even on the coldest day of winter! Stayed tuned for the results of 2011's competition.

Best California Raisin Pie Under The Sun

Janet Ropp, FL - Third Place Amateur Division California Raisin Category
2009 APC Crisco® National Pie Championships

INGREDIENTS

Crust

- 3/4 cup crushed saltine crackers (about 18)
- 1 1/4 cup coarsely chopped pecans
- 1 tablespoon orange zest
- 1 1/2 teaspoons ground cinnamon
- 3 tablespoons sugar
- 2 tablespoons butter flavor Crisco®
- 2 tablespoons butter, softened

Filling

- 1/2 cup fresh squeezed orange juice
- 1/2 cup California Natural Seedless (Fiesta) or Flame Seedless raisins
- 1/4 cup California Golden Seedless raisins
- 1 tablespoon maple syrup
- 1/2 teaspoon cinnamon extract
- 1/3 cup flour
- 1/4 cup sugar
- 2 tablespoons light brown sugar
- 2 eggs, beaten
- 1/4 cup light corn syrup
- 2 tablespoons maple syrup
- 1 1/2 teaspoons vanilla extract
- 1 tablespoon orange zest
- 2 tablespoons butter, melted
- 1/4 cup chopped dates
- 1/4 cup chopped pecans

PROCEDURE

Crust

Preheat oven to 350°F. In large bowl, combine crushed crackers, chopped pecans, zest, cinnamon, and sugar; mix together. Add shortening and butter. By hand, mix together well. Turn into lightly greased 9-inch pie pan and press evenly over bottom and up sides. Set aside.

Filling

In medium saucepan, combine orange juice, raisins, maple syrup, and cinnamon extract. Cook over low heat until raisins are plump, about 30 minutes. With slotted spoon, drain and spread raisins into prepared crust.

Combine flour and sugars in mixing bowl; mix well. Add eggs, syrups, vanilla extract, orange zest and melted butter, stirring until well blended. Stir in dates and spoon mixture evenly over raisins in crust. Sprinkle pecans over all.

Set pie pan on cookie sheet and cover edge of crust with strips of foil. Bake at 350°F for 25 minutes; remove foil and bake for another 10 to 15 minutes, until filling is set and crust is golden. Cool on wire rack. Garnish with candied orange peel, if desired.

Serves 8

America's Best Raisin Bread Contest

There were thirteen winners, a baker's dozen - one more than originally intended for the third annual America's Best Raisin Bread Contest (ABRBC) due to a tie in the Artisan Student category for the Grand Prize. A total of 85 entries were received from professional and student bakers across the country last fall which was a significant increase compared to 2009's 60 entries and 2008's 40 entries.

Last year, after the finalists' bake-off in October, six of the winners used a combination of natural seedless raisins and golden seedless raisins to highlight other ingredients such as goat cheese, caramelized onions, buttermilk, chocolate chips, oregano, parsley, pepper flakes, parmesan cheese, and orange zest. Several of the winners products are now on sale in their bakeries and via wholesale channels.

As we prepare for 2011's ABRBC, the CRMB is partnering with the Bread Bakers Guild of America, whose members held four of the thirteen winning prizes in 2010's competition. This 1,300 artisan baker organization will help promote our bread contest as the only professionally sponsored contest that will lead entrants to participate in the World Cup of Baking, held every three years in Paris. The CRMB will contribute funds to support The World Cup of Baking's Team USA for every ABRBC entry received from Guild members, which will help the CRMB reach its 2011 goal of 200 ABRBC entrants! New products mean new business for the California raisin industry.

2010 Artisan Grand Prize *Couronne Aux Raisins* by Mitch Stamm of Johnson & Wales University

New Product Development

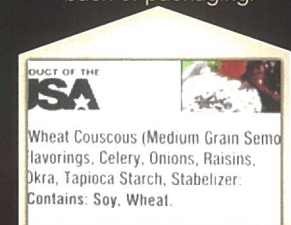
The California raisin industry and the CRMB are continually looking for new products and new usage opportunities for California Raisins. In addition to product concepts created by Mattson (on behalf of the CRMB) each year for the Product Innovation Exchange (PIX), new products launched overseas are also a source of innovation for domestic food manufacturers. In 2009/2010, an Eastern candy company switched to California Raisins following a presentation at PIX. Birds Eye® reformulated their frozen Travel the World meals with raisin juice concentrate to replace soy sauce and lower sodium. One bakery and two meat companies are still on a proprietary follow up to adding a full fruit portion into a few of their school foodservice products. A technologist at Dawn Food Products, Inc. won one of America's Best Raisin Bread Contest Prizes using golden raisin paste in the formula and a national jam maker is currently evaluating a Japanese company's Raisin Confit for a possible launch.

On the packer side, National Raisin Company launched Raisels™, a new sour fruit flavored product using golden seedless raisins and other natural sour fruit flavors. Raisels are the healthy alternative to cookies, candy and gummy fruit snacks.

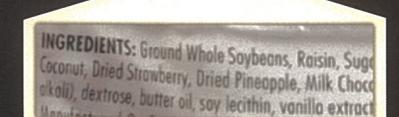
New Products launched in 2010 containing raisin products; source GNPD



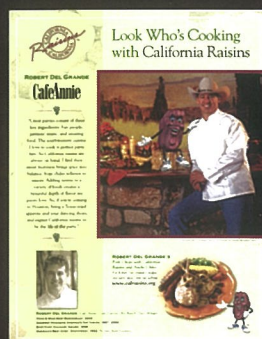
Ingredient listing on back of packaging.



Ingredient listing on back of packaging.



Marketing: 10 Year Media Evolution



Back in 1998, CRMB focused its media plan on a campaign, "Look Who's Cooking with California Raisins," featuring celebrity chefs using California Raisins in a variety of dishes to encourage stay at home and working moms to recreate similar dishes.

Fast forward to 2010 – the world of communications has dramatically changed. 2010's campaign used a mix of consumer print advertising, television spots, and online advertising, all tied to a public relations program communicating that California Raisins are "The Wise Choice"

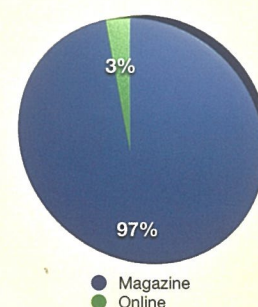
for consumers and food manufacturers. Our message – California Raisins are "The Wise Choice"... are perfectly portable, fat and cholesterol-free, delivering potassium and dietary fiber, naturally low in sodium and packed with antioxidants, resonates well with consumers. For food manufacturers, California Raisins are positioned as the lowest-cost, all natural fruit ingredient for a variety of food products: baked goods, cereals and energy bars, entrées and salads, candies and confections, and new products in the foodservice industry.

CRMB's advertising mix is different now than five years ago, placed in media vehicles for busy moms and business people, which reflects the rapid change and influence of the internet. California Raisins advertising will continue to be on target to all consumers, getting their attention and influencing their purchases.

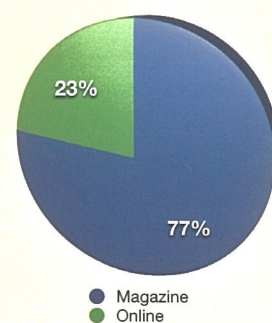
FY 2000/2001 to FY 2006/2007



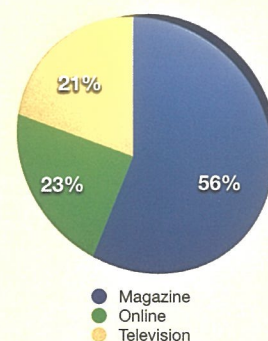
FY 2007/2008



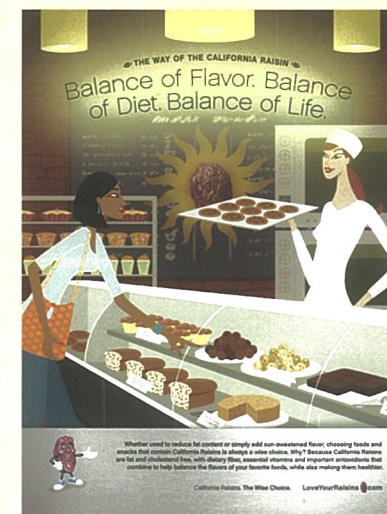
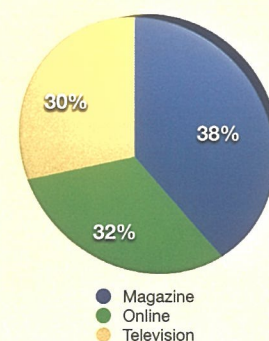
FY 2008/2009



FY 2009/2010



PROJECTED FY 2010/2011



CRMB's 2009/2010 consumer and trade magazine print ads



CRMB's 15 second "Kitchen" television ad as viewed on "Live! with Regis and Kelly" and "Everyday with Rachel Ray"



CRMB's 30 second pre-roll video and banner advertising as viewed online



Advertising Awards

Over the years, the CRMB has continued with its historical trend of entering and winning silver and bronze Fresno ADDY® Awards; however, in 2009, the CRMB entered this local competition with our Wise Choice Showdown, Grab the Goodness, and Healthy Lifestyle online games. And, the envelope for three Gold ADDY awards went to... the California Raisin Marketing Board (first time in its history) for each online game!

The CRMB has also received the following major awards:

1. Advertising Excellence Award in *Plate* magazine by Readex Research
2. Advertising Excellence Award in *Food Business News* by Baxter Research Center, Inc.

The value of such awards not only demonstrates to other organizations the professionalism of the CRMB, but also brings pride within the organization for a job well done on behalf of our growers.

Public Relations Overview

From high-profile national coverage to major market publicity, as well as visibility in the heart of California Raisin country, the world-famous California Raisins were in the news in a big way the past several years. With an overarching message that promotes California Raisins as a wise choice for healthy, on-the-go snacking and as a perfect ingredient for making the ordinary extraordinary, please enjoy the brief snapshot of coverage highlights:

- 2010 started off right with an in-depth profile of the California raisin industry on Food Network's popular show, *Unwrapped*. The segment showed the process of how healthy, delicious raisins make their way from the vine to the packaging line. Similarly, another highly favorable industry profile appeared in the Farm Bureau's *California Country* magazine, featuring an eight-page story about California Raisins that included grower profiles, industry background, recipes and amazing photography.
- Thanks to an amazing network of "Super RDs," we have secured coverage in markets such as Boston, Chicago, Dallas, Denver, Miami, Phoenix and San Francisco. Coverage has also appeared in multiple national outlets, including *USA Today*, the WB's *Daily Buzz* and a grand-slam placement in *Men's Fitness* that proclaimed California Raisins as the best fruit you can eat!
- As a direct result of California Raisins' research investment and related publicity, *Woman's World* magazine ran a two-page spread highlighting the results of the University of Connecticut study that found raisin consumption – combined with moderate exercise, such as walking – can reduce the risk of abdominal obesity. The coverage also offered highlights from the previously funded dental research that shows raisins can actually reduce the bacteria in the mouth that contributes to cavity development. In a similar vein, the popular Dr. Oz show recently set the record straight by highlighting the dental research findings in a "myth-busting" segment that sought to correct the common misperceptions about raisins and dental health.
- Finally, we have had great success publicizing marketing initiatives, such as the sponsorship of the American Pie Council's annual Pie competition. In fact, when home baker, Andrea Spring took home the Best of Show prize for her Chocolate Raisin Walnut Pie, the resulting publicity appeared in more than 160 media outlets reaching a collective audience of 12.9 million!

Speaking of pie, these examples represent just a small slice of California Raisins' coverage secured during the past five years ...all with the goal of reinforcing with consumers that they are making a delicious, nutritious, very wise choice when they choose California Raisins.



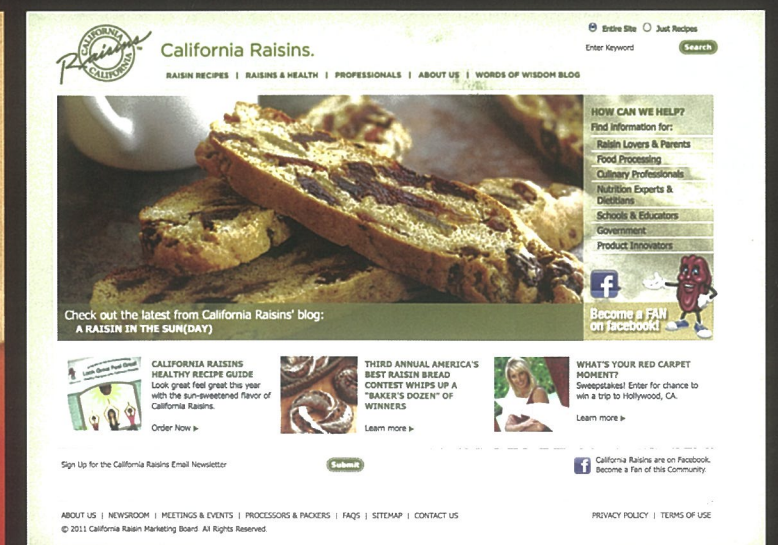
Andrea Spring with her Best of Show, 2010 APC Crisco® National Pie Championship pie, Chocolate Raisin Walnut Pie

Online: LoveYourRaisins.com

Thinking back on California Raisins' website presence in 2006, the CRMB along with MeringCarson, injected the California Raisins brand with some fun and characteristics that a younger generation of users would purchase. Leveraging the idea that raisins are natural, nutritious, tasty, versatile, and conveniently portable and therefore, a wise choice, these messages were incorporated into the 2006 website redesign, using fun bright colors. The Wise Choice Recipe contest garnered impressions as well.

In 2007/2008, the online messages continued with the New Year, New You and the Back-To-School Sweepstakes, reinforcing the key themes of health and nutrition, convenience, portability and taste. In 2008/2009, the website shifted towards a multi-touch point approach for CRMB that engaged the target consumer in their day to day life. Online/interactive creative concepts leveraged The Wise Choice campaign and brought the existing print ads "to life" through the use of animation and movement including online video and interactive games.

And, last year a new platform with a sleek new look launched to encourage use of California Raisins by target audiences – consumers, foodservice, and institutions, raise awareness of health and nutrition benefits of California Raisins and offer easier search and navigation tools for finding delicious recipes. Visit LoveYourRaisins.com and check out the new and existing content, including special/seasonal campaigns, consumer and professional recipes, our *Words of Wisdom* Blog and our Facebook presence. We hope you like it.... our 6,815 (and counting) Facebook fans do!



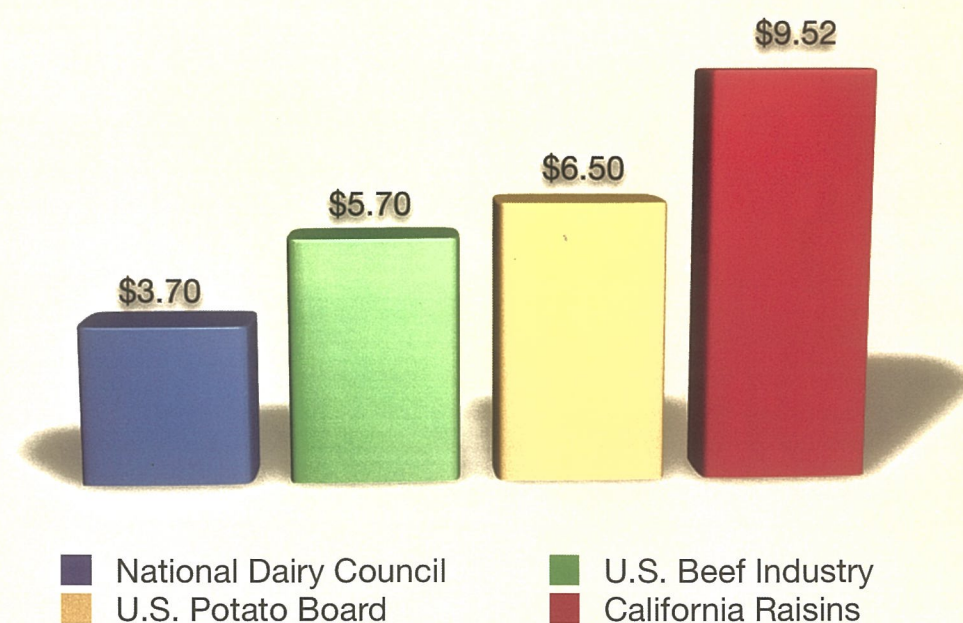
Left, LoveYourRaisin.com 2007 website design vs. right, 2010 website design

Econometric Modeling Shows CRMB Growers are Getting Real Value

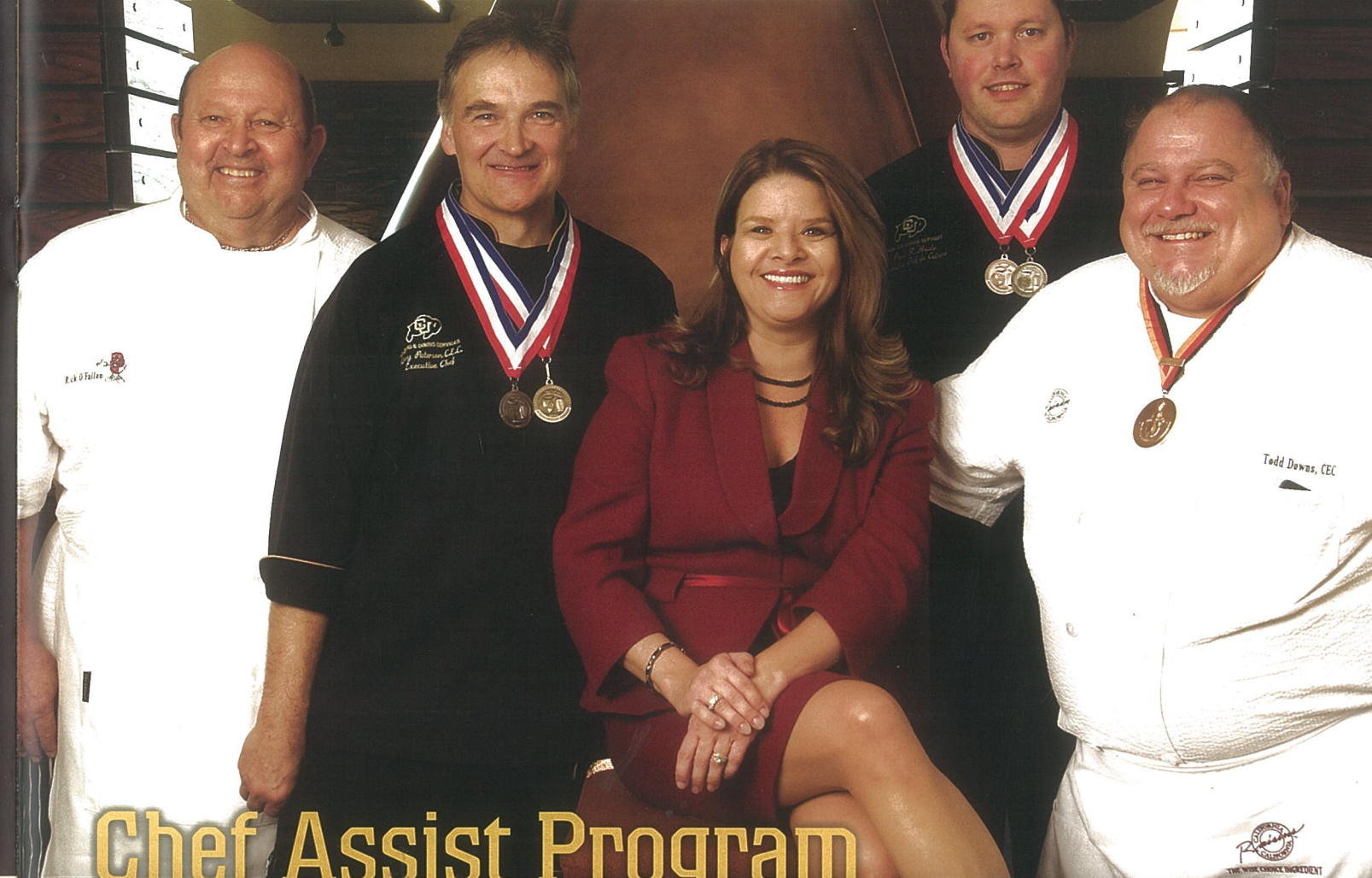
"With a \$9.52 return for every \$1.00 of promotional spending, the CRMB growers are getting real value for their assessment dollar," said Dr. Harry Kaiser, America's foremost agricultural economist from Cornell University, when he completed his econometric study for the CRMB last year. Dr. Kaiser noted that econometric modeling enables an industry to filter out the effect of irrelevant factors and quantify directly the net impact of the generic raisin marketing activities on raisin demand.

Based on Dr. Kaiser's research, without the CRMB, industry shipments would have been 13,400 tons lower each year (8.2% of the total for U.S. & Canada); raisin pricing would have been \$153.62 lower per ton and total revenue to the growers would have been \$27.3 million lower each year since 2000. By any measure, the value of the CRMB to the growers is substantial according to Dr. Kaiser. The chart, *Grower Return Per \$1.00 Marketing Spend*, illustrates that the California Raisin's return was significantly higher than other commodity programs he has investigated, nearly a 10 to 1 return from the period of 2000 to 2009.

GROWER RETURN PER \$1.00 MARKETING SPEND



From left: Rick O'Fallon, CRMB; Kerry Paterson, CEC, Executive Chef, University of Colorado; Amy Beckstrom, Director of Dining Services, University of Colorado; Paul Houle, Executive Chef de Cuisine, University of Colorado; Todd L. Downs, CEC, CRMB Chef



Chef Assist Program

This program consists of the CRMB culinary staff going into a host university and developing raisin dishes for placement in the university menu cycle. CRMB's culinary staff (Consultant Chef Todd Downs and Director of Marketing, Rick O'Fallon) also educates the university's culinary team on how to incorporate raisin paste and raisin juice concentrate as substitutes for added sugar and salt in menu dishes which is positively received. Finally, the Chef Assist Program targets advertising to all institutional foodservice providers to secure more participants for future programs and to gain additional exposure to raisin products.

During 2008/2009, CRMB solicited universities for participation. In 2009/2010, not one university had to be solicited; universities called CRMB and asked for the Chef Assist Program. In total, over the 2 year period, nine universities have been visited, raising awareness of raisin usage and raisin products to culinary teams who prepare a total of 136,000 meals per day. E-mail rick@raisins.org for additional meals per day statistics.



Mitch Sangha, California Raisin grower

Background

MISSION STATEMENT

The mission of the California Raisin Marketing Board is to conduct market development activities to improve the demand for all categories of raisin usage, including ingredient usage, and for retail package, both branded and private label. In addition, the mission is to create a positive marketing environment within which the industry can collectively expand the worldwide demand for California raisins. This is facilitated by:

- Identifying new markets, product and program opportunities through market research
- Conducting market development activities to improve the demand for all categories of raisin usage
- Coordinating an international marketing program with the Raisin Administrative Committee that may consist of both generic and branded activities including advertising, sales promotion and public relations
- Conducting production and processing research to improve the quality and functionality of the industry's products
- Representing the interest of all segments of the California raisin industry by building positive relationships with the food trade, consumers and government agencies
- Evaluating the effectiveness of Board programs through advertising tracking studies, econometric modeling or other types of research

Marketing Order Requirements

THE PURPOSE OF THE ANNUAL REPORT IS TO MEET THE REQUIREMENTS OF THE MARKETING ORDER FOR CALIFORNIA RAISINS.

- Strategic Plan and Overall Objectives
- Activities
- Research
- Agency Backgrounds
- 2010/2011 Proposed Activities
- Executive Committee
 - Board and Alternate Members
 - Term June 1, 2009 to May 31, 2011
- President's Executive Summary

Strategic Plan and Overall Objectives

Pursuant to Article V, section F of the marketing order for California Raisins, a summary of all efforts implemented to measure the degree to which the stated objectives have been achieved.

OBJECTIVE 1: STIMULATE MARKETPLACE DEMAND FOR RAISINS.

Response: Seven platforms were used in all efforts to stimulate demand for California Raisins.

- Consumer media
- Trade media
- Foodservice (commercial and non-commercial) sector
- School Foodservice sector
- Health and Nutrition sector
- Baking sector
- New Product Development sector

All aspects of pushing demand for California Raisins were folded into each one of the above mentioned platforms over the marketing year 2009/2010.

OBJECTIVE 2: DEVELOP REPORTABLE DATA REGARDING HEALTH AND NUTRITION PROPERTIES OF RAISINS THAT CAN BE USED TO PROMOTE RAISIN DEMAND.

Response: Dr. James Painter, CRMB's Nutrition Research Director, and the CRMB's Scientific Nutrition and Research Panel are currently working on reportable data, but no new data was utilized in the 2009/2010 year.

OBJECTIVE 3: UNDERTAKE CROP RESEARCH PROJECTS THAT IMPROVE EFFICIENCIES, BOOST QUALITY AND/OR DELIVER OTHER ATTRIBUTES THAT ENHANCE RAISIN APPEAL.

Response: The research projects funded by CRMB in 2009/2010, include such topics as identification of raisin moth damage, by Stephen Vasquez; to breeding rootstocks resistant to aggressive root-knot nematodes by Peter Cousins. These valuable research projects (listed in the Research Projects found on page 26), as well as the others, have all contributed to efficiencies and quality of California Raisins.

OBJECTIVE 4: ASSURE PRODUCER AND INDUSTRY STAKEHOLDERS UNDERSTAND THE VALUE OF CRMB ACTIVITIES.

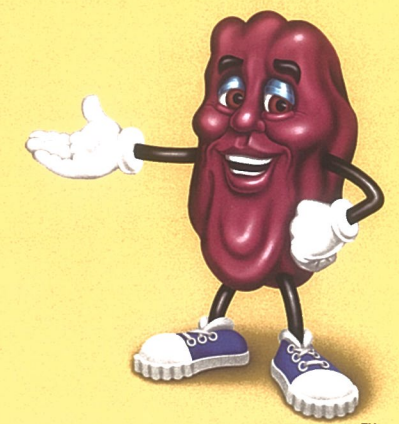
Response: The CRMB Raisin Review serves as our grower's newsletter and informs our stakeholders of timely marketing activities. Additionally, the Raisin Industry Weekly Update from the office of CRMB's President provides updates and topics of interest to industry members. Also, the CRMB invites Board members to attend key industry events and communicate our message to participants.

OBJECTIVE 5: SAFEGUARD THE STAKEHOLDER ASSETS AND INTELLECTUAL PROPERTY OF CRMB.

Response: The approval of the California Department of Food and Agriculture on the proper registration of CRMB intellectual property has been implemented to protect CRMB's most valuable assets, such as the California Dancing Raisin character, the California Raisin trademark and other food development projects. Licensing procedures have been established and are in effect.

OBJECTIVE 6: ASSURE CRMB IS APPROPRIATELY STAFFED, STRUCTURED, AND SUPPORTED.

Response: The CRMB remained fully staffed for the period of August 1, 2009 to July 31, 2010. The CRMB continues to be supported by the two agencies of MeringCarson and Fleishman-Hillard, both of Sacramento.



Activities

ADVERTISING

Print: Consumer media was built on a December holiday insert campaign that appeared in *Redbook*, *Good Housekeeping* and *Woman's Day* which had a total direct in-home mailing of 10 million copies. For additional value, a CRMB Raisin Holiday Recipe Book with 75 raisin recipes with photos was offered for a minimal \$1.25 shipping and handling fee. Lastly, we were able to secure a web link from *Redbook's* website home page to LoveYourRaisins.com. The *Redbook* home page received over one million visitors in December.

Public relations: Fleishman-Hillard serves as the CRMB's public-relations partner and has executed the following promotions on our behalf:

- Submitted several announcements and press releases to agricultural trade editors and Central Valley reporters.
- Partnered with "star power" spokesperson, Alison Sweeney, host of television's *The Biggest Loser*, to launch a nationwide cause-marketing campaign with Feeding America, the country's largest hunger-relief organization, highlighting how California Raisin growers got involved to help combat the serious issue of childhood hunger in America.
- Recruited and trained a national network of registered dietitians to help tell the California Raisins health and nutrition story to both consumers and influencers.
- Reached millions of moms with relevant, seasonal campaigns, e.g., Back-to-School and New Year, New You that deliver messages about California Raisins as a wise choice for healthy, on-the-go snacking.
- Created targeted, customized programs to reach the country's Spanish-speaking population such as our Hispanic Back-To-School campaign.
- Redeveloped and re-launched LoveYourRaisins.com website with the efforts of Fleishman-Hillard's Sacramento and San Francisco offices.

TRADESHOWS AND EVENTS

The CRMB staff attended or exhibited at the following events:

Tradeshows- Industrial and Foodservice

- PlateCooks Culinary Events
- Product Innovation Exchange
- Institute of Food Technologists Supplier Night
- New Products Conference
- Institute of Food Technologists Annual Meeting & Food Expo
- Food Service Editors Conference
- Chef Assist Program, Pennsylvania State University
- Jack in the Box Culinary Summit

Tradeshows-School Foodservice

- California School Nutrition Association
- Texas Dietetic Association
- Home Baking Associations' 4-H Congress Baking Workshop
- Pennsylvania School Commodity Show
- Maryland School Commodity Show
- School Nutrition Association Annual National Conference

Conferences - Culinary Institute of America

- Worlds of Flavor
- Flavor, Quality, American Menu
- Worlds of Healthy Flavor

Tradeshows-Baking

- American Retail Bakery Exposition
- American Institute of Baking
- International Dairy-Deli Bake Show and Exposition
- American Pie Council's National Pie Championships
- America's Best Raisin Bread Contest
- Philadelphia Baking School Seminar

Tradeshows- Health

- American Dietetic Associations' Food and Nutrition Conference & Expo
- American Association of Cereal Chemists

Tradeshows-Consumer

- Fall Wine Cornucopia
- Grower Symposium



Research

CROP PRODUCTION RESEARCH

Cultural

- “Evaluation of Abscission Agents for Grapes,” by Dr. Matthew Fidelibus.

Breeding, Germplasm and Evaluation

- “Development of Improved Raisin Grapes for Mechanical Harvest Including Types Resistant to Powdery Mildew,” by Dr. David Ramming.
- “Breeding Rootstocks Resistant to Aggressive Root-Knot Nematodes,” by Dr. Peter Cousins.
- “Advancing Maturity of Raisin Cultivars Using Potassium Sprays Applied to Fruit Just Prior or During the Ripening Phase,” by Dr. Bill Peacock.

Pest/Disease Management:

- “Sustainable Controls for Vine Mealybug - 2010,” by Dr. Kent Daane.
- “Movento, Much More Than an Insect Growth Regulator,” by Michael McKenry.
- “Identifying Raisin Moth Damage in Raisin Production Systems,” by Stephen Vasquez.

HEALTH AND NUTRITION RESEARCH

Satiety

- “The Effects of a Pre-Meal Raisin Snack on Satiety and Food Intake in Children,” by Dr. G. Harvey Anderson.

Glycemic Control/Sustainable Energy

- “Effects of Carbohydrate Supplementation Type on Exercise Performance after Consecutive Day Exercise Bouts in Marathon Runners,” by Dr. Brian Davis.

Phytochemical Profiles *(Board approved on October, 2010)*

- “Phytochemical Profiles of Raisins: Isolation, Structure Elucidation, and Their Bioactivities,” by Dr. Rui Hai Liu.

Antioxidant and Disease Prevention *(Board approved on October, 2010)*

- “A Randomized, Unblinded, Single Research Site, Comparator Study of Raisins Versus Alternative Snacks on Cardiovascular Risk Factors In Generally Healthy Subjects,” by Dr. Harold Bays.

Pursuant to Article IV, Section F of the Marketing Order for California Raisins, a list of research projects conducted is listed below:

Agency Backgrounds

MATTSON

Headquartered in San Francisco, Mattson is the country's largest independent developer of new foods and beverages. For 33 years, the company has been located in the Bay Area, where food trends emerge. Mattson's creative team of food inventors help clients identify new product opportunities where none seem to exist. Mattson provides culinary services as well as technical product formulation and commercialization.

With over 20,000 square feet of food development labs, Mattson works across all segments, technologies, and channels of the food industry. The company is 70-people strong and is 100% employee-owned.

Mattson works as CRMB's product development department. This includes helping CRMB identify new product concepts for current and potential new California Raisin customers. Mattson then creates edible "protocepts" of these ideas to illustrate how California Raisins are an ingredient that is a perfect fit for these potential customers. By providing customers with commercially formulated and processed edible samples, as well as formulas, Mattson helps move CRMB from a supplier to a valued development partner.

Principle personnel involved in our account:

Barb Stuckey, Executive VP, Marketing
Carol Borba, Innovation Manager

MERINGCARSON

MeringCarson is one of California's leading independent full service advertising agencies with 22 years in business. With locations in Sacramento and North San Diego County, MeringCarson has had great success working on some amazing California brands like California Raisins, CA Grown, Disneyland, Raley's/Bel Air/Nob Hill, and California Tourism. This agency prides itself on being "California's Agency."

"We work with the California Raisin Marketing Board on a suite of advertising services including, Account Planning and Research, Media Planning and Buying with Post Buy Analysis, Interactive Strategy and Implementation with Reporting Measurement, Creative Development, Graphic Design, Account Management and Brand Stewardship. It's a partnership that allows us to build successful relationships with your target using a heart + head = results approach we call "Meringology" says Dave Mering. "We connect with the audience on an emotional level where the California Raisins brand can enjoy true loyalty."

A number of key MeringCarson personnel work on the California Raisins brand, helping to provide great thinking, great creative and great client service. John Keys, General Manager, and Account Supervisor for California Raisins, has been with MeringCarson for 7 years. Wade Bare, Account Executive, helps manage and steward the California Raisins brand. Cori Boone, Account Planner, initiates a lot of the thinking and heads up the research for California Raisins. John Mergen, Director of Media Strategy, and Lori Richards, Media Planner, provide media planning and buying support. In the Creative Department, key personnel include Dave Mering – CEO/Creative Director, Greg Carson – Creative Director, Colm Conn, Art Director, and Scott Conway – Senior Copywriter.



Agency Backgrounds

FLEISHMAN-HILLARD

Fleishman-Hillard (FH) serves as the CRMB's public-relations partner. "With more than 2,000 employees in 80 offices, FH is one of the largest and fastest-growing public-relations firms in the world. "While our reach is global, we are firmly rooted in California," says Dan Barber. Opening in 1989 to serve the state's food and agriculture industry, the team's mantra is: 'If you can produce it, we can promote it.' Support of national and state commodities boards is our bread and butter; food and nutrition communications is our specialty."

FH works closely with the CRMB staff to handle "farm-to-fork" communications for the California Raisin industry. Examples of activities conducted with the CRMB are listed on page 23.

The FH team is led by senior strategist, Dan Barber, and Vice President, Shelly Kessen, with extensive support of nutrition expert, Allison Beadle, R.D., and project management and media-relations specialists, Jenna Kirkwood and Julie Berge. A team of deeply experienced Hispanic and digital communications experts rounds out the FH line-up.

FLEISHMAN
INTERNATIONAL COMMUNICATIONS
HILLARD

CULINARY CREATIONS

Culinary Creations has provided free-lance food consulting services to California-based food processors and marketers since 1983. Bernadine B. Ferguson, founder and owner, has more than 30 years experience in recipe testing and development, product promotions and consumer education, providing a firm foundation for the services offered. She holds a master's degree in Food Science, a bachelor's degree in Home Economics, and her extensive travel brings special flavor and interest to all our consumer connections.

With over 30 years in the California raisin industry, Bernadine and her staff continue to provide on-going insights to consumers and foods via Bernadine's former service as Public Member to the California Raisin Advisory Board and as independent contractor to the California Raisin Marketing Board. Over the years, Culinary Creations has been integral in:

- Maintaining the recipe database at LoveYourRaisins.com by procuring, formatting and testing recipes, computing content, and posting recipes and photos to the website
- Writing a monthly electronic newsletter to consumers about California Raisins
- Working closely with staff to develop nutrition education and raisin promotion materials for School Foodservice
- Supporting efforts in the Volume Channel with recipe formulation, nutrition analyses and recipe concepts
- Consulting and guiding the Health and Nutrition Research as it is related to the marketing plan
- Providing other support services in copy writing, editing and proof reading, as well as participating in activities related to the efforts of the marketing order as it promotes California Raisins.



2010/2011 Proposed Activities

CONSUMER MEDIA

A new 15 million direct mail Thematics "Look Great, Feel Great" recipe program was added with inserts in *Family Circle*, *Woman's Day*, *Good Housekeeping*, *Better Homes & Gardens* and *Ladies Home Journal*. CRMB returned to television with 10 second video commercials on Oprah, Dr. Phil, and Rachel Ray TV shows. Additionally, filming of the TV food show "Taste of New York" was done for the holiday period and two more filmings are in the works.

TRADE MEDIA

A new component was added to the trade media mix for 2011/2012, *Pastry & Baking North America*.

FOODSERVICE

Major developments were made on three levels of this industry segment:

Level 1: Commercial

Level 2: Non-commercial; (College and University foodservice programs)

University of Missouri, University of Colorado at Boulder, The University of Iowa, Villanova University and University of California, Berkeley were added

Level 3: Chef seminars and training; *Plate Magazine's* Chef's Table orientation was added this year

SCHOOL FOODSERVICE

This segment has been expanded to encompass use of selected partners whose products use raisins as a major ingredient. Expansion of this concept in both the Texas and California School Nutrition Association tradeshow continues to prove beneficial for the program.

HEALTH AND NUTRITION

2010/2011 includes Dr. James Painter, (CRMB's Nutrition Research Director) into the food show circuit as an active panel discussion leader and keynote speaker at Menu Directions and Wellness 11™ Powered by *Food Technology Magazine* Convention.

BAKING

Baking continues to be a major segment for CRMB activity centering around America's Best Raisin Bread Contest, which saw a 50% increase in applicants over last year. Two new organizations will be folded into our CRMB programs: The Bread Bakers Guild of America and the French Pastry School of Chicago.

NEW PRODUCT DEVELOPMENT

This segment remains a growth target area for CRMB. We will continue to partner with Mattson for the 2011 Product Information Exchange conference. Advertising in this arena has moved from the *Prepared Foods* publications to the Institute of Food Technologists publication, *Food Technology*.

Lastly, the big news in 2010 was the December launch of McDonald's® new \$1.99 Fruit and Maple Oatmeal, containing a combination of fresh fruit, California natural seedless and golden seedless raisins together with dried cranberries, which was the result of a collaborative effort among several Fresno-area packers. We're lov'in it!

Detailed information can be secured by contacting Rick O'Fallon, Director of Marketing, at (559) 248-0287 or by e-mail, rick@raisins.org.





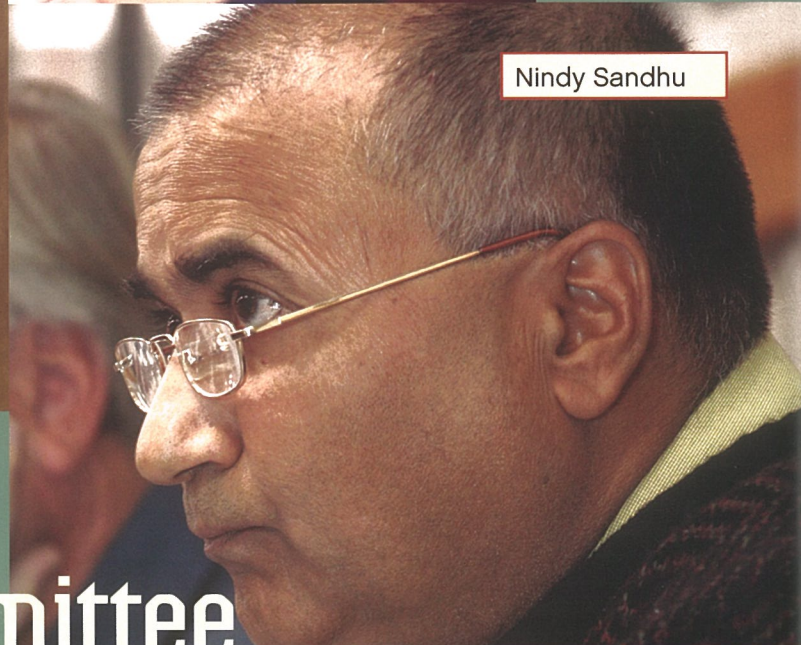
Steve Spate



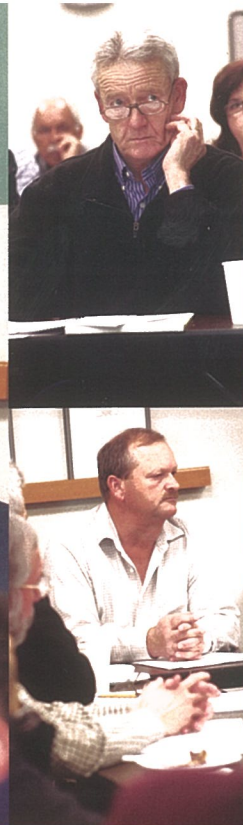
Jon Marthedal



Nindy Sandhu



Dennis Wilt



California Raisin Marketing Board in session

Executive Committee

MR. DENNIS WILT

Chairperson

MR. JON MARTHEDAL

Vice Chairperson

MR. STEVE SPATE

Secretary

MR. NINDY SANDHU

Treasurer

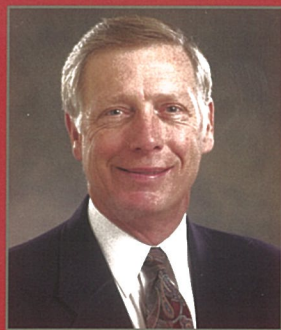
THE CRMB STAFF WISHES TO THANK THE MEMBERS AND THE ALTERNATES OF THE CALIFORNIA RAISIN MARKETING BOARD.

Alan Kasparian
Barry Kriebel
Bill Sahatdjian
Chris Gunlund
Dennis Wilt
Doug Cords
Eric Cisneros
Glen Goto
Harold Hilker
Harvey Singh
Jeffrey Bortolussi

Jon Marthedal
Kathy Merlo
Kenny Bedrosian
Kristina Sahatdjian
Manuel Medeiros
Michael Koligian
Michael Mikaelian
Mitch Sangha
Monte Schutz
Nindy Sandhu
Rick Stark

Robert Sahatjian
Ron Kazarian
Steve Spate
Vaughn Koligian
Victor Sahatdjian

President's Executive Summary



AN INDUSTRY IN BALANCE!

As we close the chapter of the 2009 crop year and examine the work of the California Raisin Marketing Board, long-time raisin industry growers, packers and professionals are all terming this as the first time in a long-time that the "industry is in balance".

- Inventories are at the lowest levels in 30 years!
- Export shipments during 2009 set an all-time record!
- Raisin Field Prices are at the highest levels ever!
- And, the grower gets to keep all the money, meaning the free tonnage of all raisin varieties is at 100%!
- An icon of the food industry, McDonald's, has just launched their national advertising campaign touting their new dietary-conscious oatmeal with Raisins!
- A Raisin Pie was the National Pie Champion!

As an industry, we have been extremely blessed with a good harvest, near ideal marketing conditions, balanced supply and demand, excellent consumer acceptance, and recognition of the California Raisin as the best in the world! It is indeed "The Wise Choice"!

2009 RAISIN CROP

Comparative Data for Deliveries to Handlers, in sweatbox tons, as compiled and released by the Raisin Administrative Committee:

Variety	2009/2010	2008/2009	%Change
Natural Seedless	298,532	364,268	-22%
Dipped Seedless	3,827	4,845	-21%
Golden Seedless	17,008	19,782	-14%
Zante Currants	2,708	2,912	-7%
Sultanas	63	67	-6%
Muscats	8	5	+60%
Monukkas	155	287	-54%
Other Seedless	7,304	6,529	+12%
Other Seedless Sulfured	413	521	-21%
Total	330,019	399,217	-17%

2010 RAISIN CROP

On October 5, the official crop estimate for Natural Seedless Raisins was established by the Raisin Administrative Committee for the 2010/2011 crop year at 293,272 tons.

CALIFORNIA NATURAL SEEDLESS RAISIN SHIPMENTS, PACKED TONS						
	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10
Natural Seedless Deliveries to Handlers	254,652	306,361	271,679	316,116	349,697	338,422
Domestic, Canada & Mexico Shipments	193,680	186,358	188,944	193,609	191,929	186,176
Exports	106,755	97,672	101,684	142,541	125,789	152,246
Total Shipments	300,435	284,030	290,628	336,150	317,718	338,442

European Grapevine Moth

On April 28, 2010, the USDA's Systematic Entomology Laboratory confirmed the capture of two European grapevine moths (EGVM), *Lobesia botrana*, in two separate traps about ½ mile apart southeast of the city of Fresno. These traps were part of a statewide program to detect this invasive moth. As a result of the finds, additional traps were placed in an approximately 80 square mile area around the discoveries by Fresno County and CDFA staff. An additional EGVM was found May 1, in the Kingsburg area, approximately 11 miles from the original find site. County, state, and federal officials developed an agriculture quarantine to prevent the human aided movement of the moth. Treatment options for the EGVM included traditional and organic ovicides and larvicides as well as mating disruption. These activities were designed to give both domestic and international trading partners confidence that grape products moving in commerce were free of EGVM.

The Fresno County Department of Agriculture and the California Department of Food and Agriculture (CDFA) established over 5,000 EGVM traps throughout the county. The Fresno County Ag Commissioner monitored the traps.

European grapevine moth was first detected in Napa County in September of 2009.

EGVM is a grape pest of economic importance in Europe, North Africa, the Middle East, southern Russia, Japan and Chile. The larva feed on grape flowers and developing fruit. Second and third generations cause the most damage by direct feeding on mature grape berries and indirectly by predisposing the crop to grey mold, a fungal infection caused by *Botrytis cinerea*. Damage is greatest in grape cultivars with compact clusters or that are sensitive to rot.

FEDS ADD FUNDS TO FIGHT GRAPEVINE MOTH

By Robert Rodriguez,
as published in The Fresno Bee

The federal government is providing California with an additional \$1 million to help fight the spread of the European grapevine moth, one of the state's newest pests. The news comes on the heels of Monday's announcement that the destructive moth was found in Fresno County.

"We understand the importance of a rapid, effective response to this invasive pest to protect California's grape and wine industries," said Cindy Smith, administrator for the USDA's Animal and Plant Health Inspection Service. "With this additional funding, we will be able to expand our response efforts as we work in close partnership with the California Department of Food and Agriculture, county agricultural commissioners and growers."

The U.S. Department of Agriculture already had allocated \$1.7 million to deal with the pest. The new funds may help pay for the cost of additional trapping in the state, said Carol Hafner, Fresno County Agricultural Commissioner.

The state has placed 50,000 insect traps throughout the state's grape-growing regions to determine where the quarter-inch moth may be hiding.

The bug was found in Napa County in November and has since spread to Sonoma, Solano and Mendocino counties.

Agriculture officials, scientists and grape farmers say the moth is highly destructive because it feeds on the plant as it develops from larvae to a moth.

In Chile, where the moth was discovered three years ago, entire vineyards were destroyed by the pest.

"The impact on the wine, table and raisin grape industries could be significant if there is a widespread infestation," said A.G. Kawamura, secretary of the California Department of Food and Agriculture. "Our goal is find out where it is and shut it down."

State, federal and Fresno County officials are working on an eradication and quarantine plan.

Two of the moths were found Wednesday in insect traps about a half-mile apart in a southeast Fresno vineyard. A third moth was found in the Kingsburg area Saturday.

CRMB Statement of Activities

Year Ended July 31, 2010

Revenue:

Assessments	\$6,831,132
Interest	32,788
Miscellaneous	4,097
Total revenue	6,868,017

Expenses:

General and Administrative:

Salaries	330,715
Payroll taxes	26,404
Retirement-employer contribution	24,186
Employee benefit administration	3,411
Employee Costs	305
Staff Education and Training	4,445
Insurance-General	47,684
Insurance-Group Health	81,988
Rent	81,788
Moving Expense	9,724
Telephone	8,176
Postage	30,451
Office supplies	12,399
Repairs and Maintenance	6,213
Memberships and Surveys	76,061
Consulting – HR/General Counsel	1,984
Consult-Trademark Registration	42,675
Auditing Fees	6,950
Equipment Lease	19,700
Equipment Purchase	843
Depreciation Expense	7,500
Capital Outlay	-
Travel-Office	9,194
Travel-Committee	2,058
Committee Meetings	640
Bank Charges	8,623
Software/Programming	6,612
Legal Fees	93,954
Product Samples	26,699
Marketing Branch	63,878
Support Services	230,000
Equipment reimbursement	15,000
Special Activities-Miscellaneous	24,252
Total General and Administrative	1,304,512

Marketing Activities:

Food Technology	10,000
Culinary Institute of America	118,393
California Dried Fruit Coalition	32,089
Advertising Public Relations & Publicity:	
Account Management Fee	21,343
Pre-Production	165,978
Media Buy-Consumer	1,534,040
Media Buy-Trade Publications	296,081
Media Buy-Online	433,124
Website Development and Maintenance	176,386
Public Relations	910,944
Printing-General Use	27,133
Channel Development:	
Foodservice-Including	48,340
Industrial Manufacturing	89,287
Baking, Snacking, and Confectionery	208,925
Government Programs	6,726
School Foodservice	105,630
Trade Shows/Event Marketing:	
Foodservice Trade Shows	48,263
Industrial Trade Shows	63,844
Baking, Snacking, and Confectionery	119,244
School Trade Shows	35,820
Health Trade Shows	78,724
Event Marketing	2,618
Research:	
Market Research	55,920
Health and Nutrition Research	128,947
Food Research and Development	34,668
Crop Research	172,727
Minor Varietals:	
Goldens, Zantes and Other Varietals-Export	595
Goldens, Zantes and Other Varietals Domestic	73,238
Total Marketing Activities	4,999,027
Total Expenditures	6,303,539
Excess Revenue Over (Under) Expenditures	564,478
Gain on Sale of Fixed Assets	222
Change in Net Assets	564,700
Fund Balance/Net Assets:	
Beginning of Year	8,028,453
Prior Period Adjustment (Correction of Error in Previously Issued Financial Statements)	300,000
End of Year	8,893,153



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